Recovery Works

INDIANA'S FORENSIC TREATMENT PROGRAM

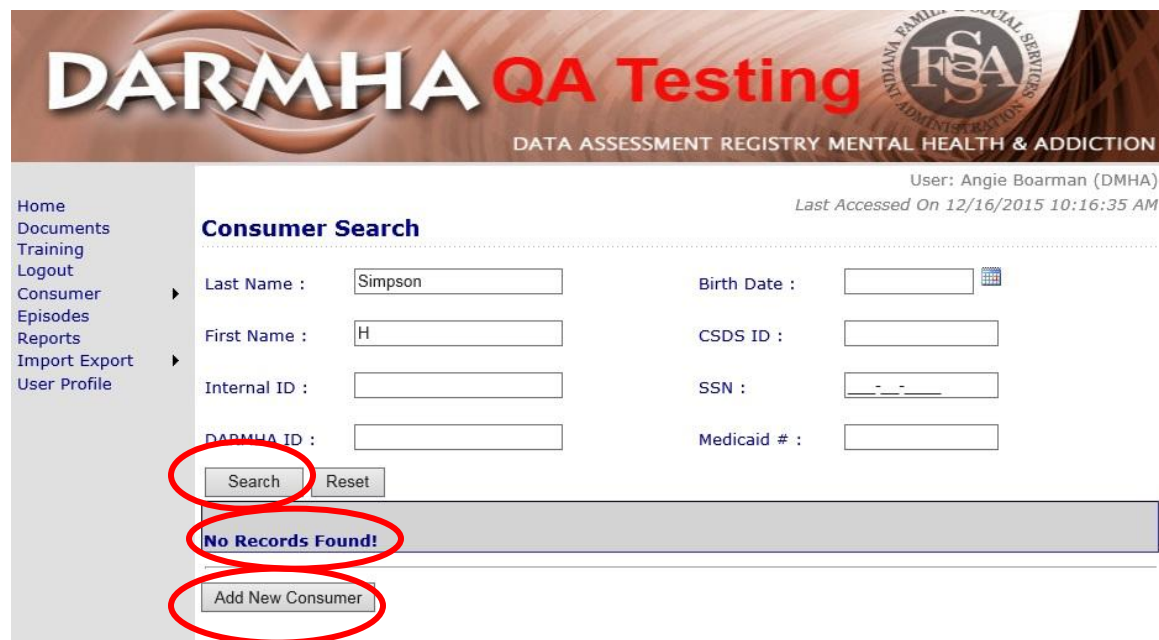# DARMHA and WITS USER MANAUAL

DARMHA Enrollment

All Recovery Works participants MUST first be enrolled in DARMHA (Data Assessment Registry Mental Health and Addiction). Once a participant is enrolled in DARMHA, agencies may bill in WITS (Web Infrastructure for Treatment Services).

1. Go to the DARMHA website. The website address is: https://dmha.fssa.in.gov/DARMHA

2. Log in using your unique log in information. If you do not have a DARMHA log in, you will need to turn in a "DARMHA New User Form" to the Recovery Works Staff at Recover.Works@fssa.in.gov. The form can be found on at the Recovery Works website, www.RecoveryWorks.fssa.IN.gov. We will confirm that your agency is registered in DARMHA. If your agency is not in DAMRHA, we will work with you to get the "DARMHA Provider Registration Agreement Form" completed.

3. Search for the individual you would like to add. If there is "No Records Found," click "Add New Consumer." If they exist, move to Step Five.

4. Fill the Consumer page out and click "Insert."

Add Consumers

First Name:	Homer	Last Name:	Simpson
Middle Name:		Suffix:	
Mom's Maiden:	Griffin	Birth Date:	05/12/1955
Gender:	● Male ○ Female	SSN:	123-02-1222
Zip Code:	46201-____ *	Medicaid/HIP ID #:	
		Ethnicity:	Not Hispanic/Latin ▾

Race (Choose all that apply) :

☐ **African American or Black**
   People having origins in any of the Black racial groups of Africa.

☐ **American Indian and Alaska Native**
   People having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.

☐ **Asian**
   People having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent.

☑ **Caucasian or White**
   People having origins in any of the original peoples of Europe, the Middle East, or North Africa.

☐ **Native Hawaiian and Other Pacific Islander**
   People having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

☐ **Other Single Race**
   None of the other race categories apply.

CSDS ID:		Internal ID:	

[Insert] [Cancel]

Navigation menu:
Documents
Training
Logout
Consumer ▸
Episodes
Reports
Import Export ▸
User Profile

For issues, questions or comments about the web application, contact the **Support Center**. darmha@fssa.in.gov (317)-232-7925

DARMHA_QA
Version 4.5
Build 2.06

IP 10.19.156.11

5. Click "Create Episode."

Consumer View

First Name:	**Homer**	Last Name:	**Simpson**
Middle Name:		Suffix:	
Mom's Maiden:	Griffin	Birth Date:	5/12/1955
Gender:	⦿ Male ○ Female	SSN:	123-02-1222
Zip Code:	46201	Medicaid/HIP ID #:	
Internal ID:		Ethnicity:	Not Hispanic/Latino
DARMHA ID:	1377435	Registration ID :	625048
CSDS ID:			

Race (Choose all that apply) :

☐ **African American or Black**
  People having origins in any of the Black racial groups of Africa.

☐ **American Indian and Alaska Native**
  People having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.

☐ **Asian**
  People having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent.

☑ **Caucasian or White**
  People having origins in any of the original peoples of Europe, the Middle East, or North Africa.

☐ **Native Hawaiian and Other Pacific Islander**
  People having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

☐ **Other Single Race**
  None of the other race categories apply.

Record was added on 12/16/2015 12:20:39 PM

Edit Consumer	Create Episode	Add Assessment	Remove Consumer	Back To Search

6. Fill the Episode page out and click "Insert."

Episode View - Simpson, Homer

| Episode | Assessment | Encounter | NOMS | EBP | Diagnosis/Agreement |

Building New Episode:
Internal Episode Code:
05121955

| Episode Start Date: | 12/16/2015 | | Episode Status: | Consumer in Treatment |
| Episode End Date: | | | DSC Status: | DMHA Supported Consumer |

Marital Status:	Married-living Together		Insurance:	None
County:	Marion		Military Service :	No
Disability:	None Known		Veteran :	No
Referral Source:	Court/Criminal Justice		Deployed :	No
Legal Basis:	Probation/Parole		Combat :	No
Family Size:	5		Family Member in Military :	No
Family Income:	50500			
Prior Substance Abuse Episodes:	2		Medicaid/HIP Active?	○ Yes ● No
			SNAP/Food Stamps?	○ Yes ● No
Dependent Children?	● Yes ○ No		TANF?	○ Yes ● No

Insert   Cancel

7. Click the tab, NOMS, and click "New."

NOMS View - Simpson, Homer

| Episode | Assessment | Encounter | **NOMS** | EBP | Diagnosis/Agreement |

New

8. Fill out the NOMS (National Outcome Measurement System) page and click "Insert." For more information on how to fill out the NOMS, visit the "Documents" Sections of DARMHA.

NOMS View - Simpson, Homer

| Episode | Assessment | Encounter | **NOMS** | EBP | Diagnosis/Agreement |

NOMS Date: 12/16/2015

NOMS Reason: ● Initial ○ Re-Assessment ○ Discharge
Limit 1 Initial and Discharge per episode

Employment: Unemployed, Looking For Work

Employment Detail: Not Applicable

Supported Employment: Not enrolled in or not receiving supported employment services

Living Arrangement: Independent Living   **Criminal Involvement:** 1

ROLES: Not Applicable   **Social Support:** No attendance in the past mo

Needle Use: No, Consumer has not used a n   **Housing Category:** Permanent Housing

Education Level : High School Graduate   **Housing Stability :** More than 2 years

School Attendance Status : Not applicable (use for infants a   **Supported Housing?** ○ Yes ● No

Currently Pregnant? ○ Yes ○ No

Level of Residential Support

● Residential Support not needed or not Provided-consumer lives alone or with others of his/her own choosing (such as spouse, family, friends)

○ Living with person(s) who provide supportive services in the home that are needed by the consumer in order to maintain the living situation. (Services may include houskeeping, meals, companionship and may include family and friends)

○ Access to paid support in the consumer's residence as needed

○ Access to paid support in the consumer's residence 5 or more days per week for up to 8 hours

○ Access to paid support in the consumer's residence 5 or more days per week for 9 to 16 hours

○ Access to paid support in the consumer's residence 24 hours a day, 7 days per week

Level of Community Integration

● Living environment is fully integrated in the community

○ Living environment is home to persons with mental health/addiction issues, persons with other disabilities, and persons without identified disabilities

○ Living environment is home to persons with mental health/addiction issues only

Primary Substance	**Secondary Substance**	**Tertiary Substance**
Alcohol	Not Applicable	Not Applicable
Route: Oral	Route: Not Applicable	Route: Not Applicable
Frequency: Daily	Frequency: Not Applicable	Frequency: Not Applicable
Age First Use: 12	Age First Use:	Age First Use:

Insert   Cancel

9. Click the "Diagnosis/Agreement" tab, and click "New."

Diagnosis & Agreement Type View - Simpson, Homer

| Episode | Assessment | Encounter | NOMS | EBP | Diagnosis/Agreement |

New

10. Fill out the Diagnosis/Agreement and click "Insert." Providers can use DSM 5 or ICD-10 code to complete the Diagnosis fields. A complete list of codes can be found on the DARMHA "Documents" page.

Last Accessed On 12/16/2015 10:16:35 AM

Diagnosis & Agreement Type View - Simpson, Homer

| Episode | Assessment | Encounter | NOMS | EBP | Diagnosis/Agreement |

Diagnosis/Agreement Date : 12/16/2015

Primary Diagnosis 1: F10.20
Diagnosis 2:
Diagnosis 3:
Diagnosis 4:
Diagnosis 5:
SOGS:

Agreement Type
○ SMI
○ SED
◉ CA

Specialized Treatment
◉ None
○ Deaf Services
○ Opioid Treatment
○ Gambling Treatment

Agreement Change
◉ Initial
○ Refined Diagnosis
○ Special Funding

Health Conditions:
1. Diabetes? ◉ No ○ Yes
2. Cardiovascular Disease? ◉ No ○ Yes
3. Hypertension (High Blood Pressure)? ◉ No ○ Yes
4. Hyperlipidemia (High Cholesterol)? ◉ No ○ Yes
5. Cancer? ◉ No ○ Yes
6. Smoking? ◉ No ○ Yes
7. Obesity? ◉ No ○ Yes
8. Asthma? ◉ No ○ Yes
9. COPD (Chronic Obstructive Pulmonary Disease)? ◉ No ○ Yes

Insert   Cancel

11. Go to the Consumer - View (on left side menu).

Click "Edit Consumer."

Click the "Recovery Works Consumer" check box. Once the box is checked, DOC ID will show up, add the DOC ID if appropriate. And "Submit to WITS".

Once you've submitted the participant to WITS, you will then see a message with the WITS unique client number (UCD).

Make note of the participant's UCN, as you will need it for the next steps.
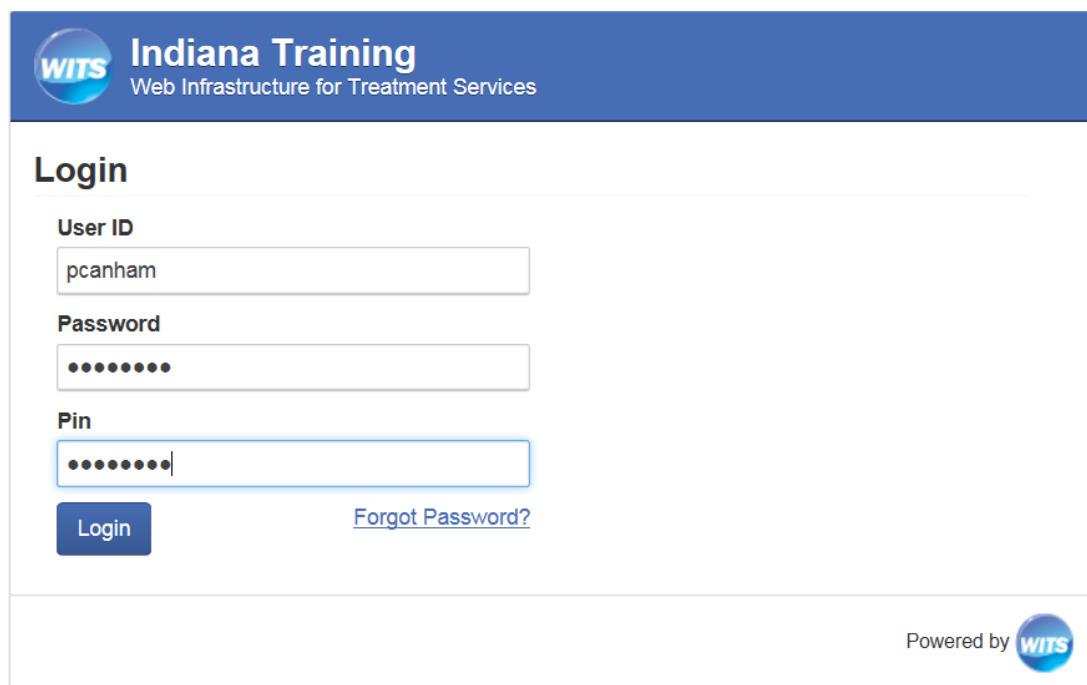
WITS Entry

Once you clicked "Submit to WITS" in DARMHA, the State of Indiana's Web service began transferring the participant's information over to WITS. This saves you, as the provider, from the need to enter the same information in both systems. We will begin with logging in to WITS.

Logging In To WITS

1. Go to the WITS website. The website address is: https://dmha.fssa.in.gov/atr

2. Log in using your unique log in information. If you do not have a WITS log in, you will need to turn in a "WITS New User Form" to the Recovery Works Staff at Recover.Works@fssa.in.gov. The form can be found on at the Recovery Works website, www.RecoveryWorks.fssa.IN.gov. We will confirm that your agency is registered in WITS. If your agency is not in WITS, we will work with you to get you set up.

WITS **Indiana Training**
Web Infrastructure for Treatment Services

Login

User ID

pcanham

Password

••••••••

Pin

••••••••

[Login]   Forgot Password?

Powered by **WITS**

Tip: If this is your first time logging into WITS or if your credentials (i.e. Password and Pin) are expired, the system will show the Reset Credential screen to allow you to enter your Password and Pin and to set your security question. Be sure to pick a Password and Pin that can be easily memorized and which is secure.   As part of the system security features, you may be asked to change your Password/Pin every few months.   Also, if you enter the wrong Password / Pin multiple times your account may be disabled.   Contact your WITS administrator if that occurs.

Home Screen

The Home screen is typically the first screen that most providers see when they log into WITS.   It provides general information such as announcements, alerts or updates in schedule.

1. The announcement section will have helpful information from the State of Indiana or from agency administrators. Hover your cursor over the pencil icon to click on the **Review** link.
2. Alert List and Scheduler are not being utilized for the Forensic Treatment \ Recovery Works! Process at this time.
3. Providers will use the left navigation to view clients, create encounters and bill for those encounters.

Client Search and Profile

Overview: The WITS process always starts with the client you are treating. This section walks you through ways to locate your client and to review the information that was automatically created in WITS from the information you entered in DARMHA

1. To search for a client, click on the **Client List** link in the left navigation menu. A blank **Client List** screen will appear. WITS will search on any fields you fill in, once you click on the **Go** button. The more fields you enter, the fewer records the system will return. Try to use unique information, such as birthdates or social security numbers, if possible.

   - You can also enter a partial name (or other field) followed by a "*". This is called a wild card search. For instance, if you search for Last Name of "Smit*", you will get people with the last name of "Smith", "Smitty", "Smithson", etc.

   - For date fields – you can use conditional searches such as >01/01/1990. If you key this into the DOB field, it will return clients with a DOB greater than 01/01/1990.

2. Look for your client in the Client List. If you find the right person, pull up the profile by hovering your cursor over the Actions pencil icon and clicking on **Profile** link next to their name. The Unique Client # (UCN) should match the value that is stored in DARMHA.

3. If you do not find your client either by name, another identifier, or the UCN that appeared in DARMHA – please contact your WITS administrator.

1. The Profile information was created from information that you initially entered into DARMHA.

2. The **Record Created By** field will have the value ''Web Provider, DARMHA''. This indicates that the Client Profile was generated from DARMHA information

3. Click the Cancel or Finish button to exit this screen

Location: RW - They got out, They got out ✏

   👤 **Client:** ▮▮▮▮▮▮ | M819208AB808100   ✪ Clear Client

Profile

Field	Value
First Name	▮▮▮
Middle Name	
Last Name	▮▮▮
Mother's Maiden Name	
Suffix	
Gender	Male ▾
DOB	8/1/1982 📅
SSN	310-90-0088
Driver's License	▾
Medicaid #	
Has paper file	▾

Field	Value
DARMHA Client ID	132792
Unique Client Number	M819208AB808100
State Client ID	
Record Created By	Web Provider, DARMHA
Last Updated By	Web Provider, DARMHA
Created Date	12/7/2015 10:21 AM
Last Updated Date	12/7/2015 10:21 AM
Residence Zip Code	47404

─ **Administrative Actions** ──────────────

Cancel Save Finish ⏩

Client Activity List and Creating an Episode

The Client Activity List provides an overview to the entire client's profile, episode (intake), encounter and program enrollment information.

1. After entering your information to DARMHA – the screen below represents what you will initially see in the activity list in WITS.   This list will grow as you create the episodes and associated encounters.
2. Once you have selected your client from the Client list – hover your cursor over the pencil icon or Click on Client List > Activity List from the left navigation to get to this screen.
3. To create an episode for your client, click on the Start New Episode link.
4. You will be presented with the Intake Case Information screen.   You will need to complete the following fields, the other required fields are pre-filled by the system:
   - Initial Contact: Select the value "By Appointment"
   - Residence: Select the county of residences for the client
   - Intake Date: Will be pre-filled with the current date – select the date that is valid for start of care.
5. Click on the **Save** or **Finish** buttons to save your changes

6. Click Finish to return to the Client Activity List.
7. Please note that you can now view the entry for the Episode (Intake Transaction) that you just created.   You will also see the Client Program Enrollment (Recovery Works) that was automatically created by the system when you saved the Episode (Intake Transaction).

Note: The terms "Episode" and "Intake" are used interchangeably in WITS.

Business rules to be aware of:
- Client must be enrolled in a Client Program in order to set up vouchers and create encounters. The good news is the system will do this automatically when you create the Episode (Intake).
- The purpose of the Client Program enrollment is to indicate that the client is enrolled in a program to receive services.
- At the time you create and save the Episode (Intake Transaction) the system will also automatically create the Client Group Enrollment (see below).
- The Client Group Enrollment (CGE) defines the payor for the Forensic Treatment / Recovery Works services. This needs to be in place in order to release an encounter to billing. As the payor will always be the State of Indiana, had the ability to automatically create the CGE (means less keying for providers).

Creating a Local Voucher for Recovery Works Services

From the above Client Activity List – hover your cursor over the Pencil icon next to the Client Profile and click on the **Review** link. You will be presented with the Client Profile screen and left navigation menu items.

1. Click on Client Profile > Voucher link from the left navigation.
2. You will be presented with the Voucher List screen. Click on the Add New Voucher Record link

You will be presented with the Voucher screen, with the Vouched Services list.

A number of the Voucher required fields are pre-populated for you.

1. The **Agreement** field outlines the dates that can be set on the voucher/authorization.
   - These dates typically represent the State Fiscal Year time period.
   - There may be more than one agreement in place at a time – representing multiple State Fiscal years, click on the down arrow to see multiple values.
   - If you have services that span these time periods – will need to set up separate vouchers.
2. The **Effective Date** and **End Date** represent the date range specific to this voucher.
   - Effective Date defaults to the current date.
   - And the End Date defaults to the current date plus 30 days.
   - You may modify these to be consistent with the date range you expect the services to occur.
   - The End Date can be no more than 30 days after the Effective Date.
3. As you add services to the Voucher, the **Voucher Services** list will populate with that information and the system will calculate totals for the vouched services.
4. Click the Save button and then the **Add Service** link to add Services to this voucher

5. The **Vouched** service screen allows you to enter the service and # Vouched Units.
6. Click on the **Service** down arrow to select the service.   If you don't see a service you need – contact your WITS Administrator.
7. Enter the appropriate number of units in the **# Vouched** Units field.
8. Click **Save** or **Finish** button when complete.
9. You will be returned to the **Voucher List** screen which has been updated with the information you entered.

10. Note that a number of fields are now grayed out and can no longer be update – also the status of the Voucher is 'Active'.
11. The service you authorized now appears in the Vouched Services List and the calculated fields have been updated.
12. You can keep adding services or click on the Finish button to exit this screen.

Voucher Calculated Field Definitions:

- **Total Vouched:** Represents the total money amount has been authorized for this voucher.
- **Total Encumbered**: Represents authorized services where the associated encounter has been released to billing.
- **Total Expended:** Represents authorized services where the associated encounter has been paid (e.g. associated monies have been expended).
- **Total Available:** Represents monies remaining on the voucher that are available for encounters. It is calculated by subtracting Total Encumbered and Total Expended from the Total Vouched amount.

Encounters and Provider Billing

To Create Encounters for a Client

1. From the **Client List** screen (menu item on left Navigation), select the client you are working with and click on the corresponding **Activity List** link (click on **Actions** pencil icon)
2. In the Client Activity List screen, search to see if encounter has been entered.   You can click on the Review link (with Actions pencil icon) to see encounter details.
3. From the main navigation menu on the left, click on **Activity List > Encounters**, you will be presented with the **Encounter Search** and **Encounter List** screens.

4. From the **Encounter List** screen, click on the **Add Encounter** link to create a new Encounter for the client. Proceed to complete the required fields including:
   a. **Service** – Service you are rendering to the client
   b. **Program Name** – This is pre-filled.
   c. **Service Location** – Select appropriate County (where service occurred) value from the drop down menu.
   d. **Start date** – The date the encounter is rendered as well as the number of units provided
   e. **Start Time \ End Time** – The start and end times of the rendered service. Entering this information will cause the system to calculate the **Duration**.
   f. **# of Service Units/Session** – This is limited by the units in the corresponding voucher for this client.
5. **Notes** field is to be completed when you are documenting an encounter that was done by an agency you contracted with to do services not available in your agency.

Note: *The service dropdown list only shows services that belong to active vouchers within the current episode. No encounter can be created for services in a closed voucher.*
You may not be able to release an encounter to billing if the number of units in the encounter is greater than the voucher available amount, or if you exceed the available yearly cap.

6. Press the **Save** button after entering the encounter
7. If you have the Release to Billing role and the encounter is ready to be billed, you will see the **Release to Billing** link in the Administrative actions.   Click on that link to release the encounter to billing.
8. Notice that the encounter you have just created appears in the list, and its status is **Released**. To see the details of the encounter simply click on the Actions pencil icon next to the encounter.
   - For encounters that have not been released to billing, you can review, delete or release to billing.   You would use the delete to erase an unbilled encounter that had been created by mistake.   Delete and Release to Billing functions are available only to staff that have been set up with the appropriate role.
   - For encounters that have been released to billing, you can review.

Closing a Voucher

WITS does have a process to automatically close a voucher. Providers should do this when services have been completed so that any monies that have not been used are returned to the general Recovery Works fund for use for other clients. We ask that prior to opening a new Voucher, you close out previous vouchers.

1. Need to be in the context of the client whose voucher needs to be closed. From the left navigation, client on Client List > Client Profile > Voucher.
2. From the Voucher List screen – select the Voucher to be closed.
3. Notice that prior to closing this voucher - $900 had been authorized but only $750 had been expended when the provider determined that all services were complete.
4. Click on the Close link in the Administrative Actions section
5. You will receive a prompt asking if you are sure you want to close the voucher. Click on the Yes button
6. The screen will reload with the updated closed voucher.
7. The Status has been changed to Close
8. The Authorized amount has been changed to $750 which matches the $750 expended. The additional $150 has been returned to the Recovery Works fund to be used for other clients.

WITS Administrative Functions

Change Credentials (Password/Pin)

This screen allows you to change your password and pin as needed.
1. Click on the down arrow next to the User field on the WITS header. A Change Credentials box will appear – click on that.
2. The Change Password screen will appear. You will need to enter your current (Old) Password, then enter and confirm a new Password.
3. You will also need to enter your current (Old) Pin, then enter and confirm a new PIN and click Change.
4. You have the option of checking the Show Password/Pin field to enable you to see the new Password and Pin information as you key it. This was done to enable end users to better remember their passwords and PINs.
5. Clicking the Change button will save your password / pin changes

Note: Password and Pin are at least 6 characters long and include at least 1 number.

Change Security Question

Security Question is used if end user forgets their password at login. It is initially set the first time an end user logs into WITS.
1. From the WITS login screen – click on the Forgot Password link.
2. You will be asked to enter you User ID, then click the Submit button.
3. You will need to provide the security answer you established the first time you logged into WITS, then click the Submit button.
4. You will be presented with a message that an email with details on how to reset your account is being sent to your email address on file.
5. You will receive an email from atr2in@witsweb.org with a link similar to what is shown. Click on the link to be able to change your security question.

6. You will be presented with the Reset Credentials screen. Clicking on the down arrow on the Security Question field will allow you to change your Security Question.
7. You must also change your Password and Pin when changing your Security Question.
8. Click the Save button to have your changes implemented.

Reviewing all Vouchers for Your Agency

1. To review all vouchers within the current Agency, you must first select the **Agency > Billing > Authorization List** link located in the Left side navigation.
2. Once you are in the **Voucher Search** screen, you may search using any of the available criteria or filters, or you may simply click the Go button to generate a list of all of the available vouchers within the Agency.
   - Easy to search by client First and Last name, UCN or authorization effective date
   - This screen also helps you to gain an understanding of the monies being spent for these services.
3. The browser window will reload and the voucher list will now appear on the screen with a list of available vouchers. To review any of the vouchers simply hover on the Actions pencil icon and click on the **View** link.
4. Click on the Export link to export the voucher list to an Excel spreadsheet, if needed.
5. Can also generate and print a voucher summary report, if you have the need to give a hard copy of the voucher to the client.

Voucher Summary Report generated by clicking on **Generate Report** link.

Care Coordinator: FTRW Agency   **Date:** 11/25/2015
Client Name: Dancer, Native
Client ID: M619577AD738100
Payor Plan: Recovery Works

Service Provider: FTRW Agency   **Date Accepted:** 11/25/2015
Agency Facility Name:
Voucher effective from: 11/25/2015   to   12/25/2015   **Status:** Active
Service: Doing Stuff here
Vouched Units: 4   **Vouched Amount:** $20.00   **Avail. Units:** 4.00   **Avail. Amount:** $20.00

                                          Total Service Provider Voucher Amount: $20.00
                                                    Available Funds Remaining: $20.00

Total Client Amount of Vouchers: $20.00   **Total Funds Remaining:** $20.00

_____   _____
Care Coordinator Signature   **Date**   **Client Signature**   **Date**

Agency Review of Claims

Each agency may have a designated person who has accountability for reviewing encounters and releasing them to billing. The WITS Administrator will work with your agency to determine who has the Release to Billing role. The agency staff with the Release to Billing role should review the encounters every day to ensure they are being released to billing in a timely fashion. If encounters are not released to billing they will not get paid by the State.

To determine if there are encounters that are not released:

1. Go to the **Agency > Billing > Encounter List** link from the left navigation, you will be presented with the Encounter Search and Encounter List screen.

2. If you are looking for specific encounters – you can enter that encounter's criteria in the Encounter Search fields and click on the Go button to bring back those encounters that meet those criteria. Hitting the Clear button will clear all the Encounter Search criteria.

3. Review items returned in the Encounter List. You may also click on the (Export) link to export the information to a spreadsheet.

4. Any encounters that are in a status of **Not Released** are candidates to be released to billing (RTB).

5. Use the actions pencil icon to view the profile of the encounter

6. Click on the Release to Billing link in the Administrative Actions to release the encounter to billing.

Claim Batching/Submission/Adjudication

After encounters are released to billing a **claim item** is automatically created.

For INDIANA WITS, there are automated processes that run daily to automatically batch up the claims and on a weekly basis to bill the batched claims to the State.   For Forensic Treatment / Recovery Works, there is also automated process to automatically adjudicate and mark the claim in WITS as paid.

The State then has processes outside of WITS to generate a check/EFT transaction to the provider for claims that are paid.

Late Friday night every week, WITS gathers all of the encounters that have been released to billing and creates a file. Monday-Wednesday, Recovery Works staff adjudicates that file and determines the verdict on any billings that were rejected or pended. On Wednesday at 4:00pm EST, all of the billings that were approved for payment in WITS are submitted and the State's WITS manager creates a file that can be read by the State payment, People Soft. That file is turned in to the Clerk's office for payment on Thursday, and they begin the payment process. Payments are made within 35 days of receipt of the file on Thursday. The process starts all over again the next day.

Claim Batch Processor takes all claims in a release status for a particular payer and loads them into a Claim Batch.   To view batches :

1. From the left navigation go to **Agency > Billing > Claim Batch List**
2. You will be presented with the **Provider Claim Batch List** screen
3. You can enter search criteria such as Plan (Payor) Name or Created Date and click on the Go button to view Claim Batches that meet that criteria.   Or click on the **Clear** button, then the **Go** button to see a list of all Claim Batches.
4. Notice at this point the status of the batch.   A Batch Status of **'Billed'** means that the claims have been batched but not yet submitted to the State. A Batch Status of **'Accepted'** means that the Forensic Treatment \ Recovery Works batch has been accepted and paid by the State (indicates that the **Provider Claim Submission Processor** has run).
5. You can then use the Actions pencil icon to view all **Claim Items** in the batch or the **Profile** of the batch. Also have the ability to use the **(Export)** link in the Claim Item List section header to download the claims to a spreadsheet

Reviewing Payments

Once you see that a claim batch has been accepted in the claim batch list – you will want to review the payment information in WITS.

1. To begin, you must first click into the **Agency > Billing** module followed by the **Payment List** link located in the left side navigation.
2. You will be presented with the **Payment Search** screen, which will display any payments.

    To generate a list, enter in your search criteria in the **Payment Search** section and click the **Go** button. Notice that the browser window will reload and the results list will appear in the **Payment List** section of the screen. Here you will be able to see all of the claim batches which have been released to billing and have been paid in WITS.
3. You never need to use the links outlined in red – WITS applies the payments from the State automatically.
4. Next, hover your cursor over the Actions pencil icon and click on the **Profile** link to view a payment profile item.

5. If you click on the **Show Payment Application** Administrative Action, you will be taken to the

EOB List screen.   This displays all the claims associated with this batch payment. Clicking on the **(Export)** link allows you to download the EOB transactions to a spreadsheet.

6. In the **EOB Transaction Search** section, you can click on the **Clear** button, then click the **Go** button. This will cause all EOB transactions for all claim batches to appear. Notice how the Adjustment Reason is also listed.

EOB Transaction Search

EOB Transaction Type		Enc #	
First Name		Last Name	
Payment #		Payor Name	

Clear   Go

⑥

EOB Transaction List (Export)

Actions	Enc #	Client Name	Svc Date	Svc Name	Rendering Staff	Transaction Type	Adjustment Reason	App Amt	App Date	Pmt #	Payor Name
	560	newtest7, sk7	11/16/2015	skNewService7	Kramperth, Scott	Payment		$60.00	11/16/2015	209	skForensic Contractor2 - 22222
	560	newtest7, sk7	11/16/2015	skNewService7	Kramperth, Scott	Other adjustments	Exact duplicate claim/service (Use only with Group Code OA except where state workers' compensation regulations requires CO)	$60.00	11/16/2015	210	skForensic Contractor2 - 22222
	571	Dancer, Native	11/2/2015	skNewService7	Canham, Patty	Payment		$75.00	12/10/2015	213	skForensic Contractor2 - 22222
	574	Biscuit, Sea	11/8/2015	skNewService7	Canham, Patty	Payment		$300.00	12/10/2015	213	skForensic Contractor2 - 22222
	575	Biscuit, Sea	11/12/2015	skNewService7	Canham, Patty	Payment		$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	573	Dancer, Native	11/15/2015	skNewService7	Canham, Patty	Payment		$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	576	Biscuit, Sea	11/18/2015	skNewService7	Canham, Patty	Payment		$225.00	12/10/2015	213	skForensic Contractor2 - 22222
	577	Biscuit, Sea	11/20/2015	skNewService7	Canham, Patty	Payment		$75.00	12/10/2015	213	skForensic Contractor2 - 22222
	572	Dancer, Native	11/20/2015	skNewService7	Canham, Patty	Payment		$150.00	12/10/2015	213	skForensic Contractor2 - 22222

Another way to view payment information is by viewing the Billing Transactions.

1. To begin, you must first click into the **Agency > Billing** module followed by the **Billing Transaction List** link located in the left side navigation.

2. You will be presented with the **Billing Transaction Search** screen, which will display any payments.

   To generate a list, enter in your search criteria in the **Billing Transaction Search** section and click the **Go** button. Notice that the browser window will reload and the results list will appear in the **Billing Transaction List** section of the screen. Here you will be able to see all of the payment information related to each individual claim/encounter (not the batch).

3. Notice that there are 2 lines for each claim/encounter – one with a type of **Charge** and one with a Type of **Payment Application**.

4. Clicking on the **Actions** pencil icon allows you to see the **Profile**, **Adjust** and **Billing History** links. The **Billing History** link is helpful in that it shows all billing actions that applied to the charge for the claim/encounter.

Creating an Announcement

1. The Announcement List can be used to post or edit announcements on your home-page for select Agencies to view. To create an announcement, click on the **Announcements** menu item followed by the **Announcement List** link located in the left navigation.
2. Next, to add a new announcement click the **Add New Announcement** link.
3. You will now see the **Announcement**" screen appear. Proceed and enter the required data in the fields specified.
4. Click on the **Finish** button when you have entered all of the appropriate information for the announcement. This will take you back to the list screen and where you will see the newly added announcement to the list.

5. To edit or delete the details of an announcement, click the **Review** link under Actions column.

Tip: Leaving the Agency Type drop down menu blank will display the message created for all of the agencies. High priority announcements will be displayed in red on the Home Page for users to see.

Glossary

Indiana WITS is an internet based data collection and reporting system sponsored by the State of Indiana.

Top Navigation Bar: This area located at the top of the Indiana WITS screen and contains information that helps the user know his/her current context in the system.
The information includes:

1. **User** (the person currently logged in the system)

2. **Location** (the Agency and Facility currently selected

3. **Client** (the client profile and data currently selected).

4. **Left Navigation:** WITS has been intelligently designed to follow common behavioral health treatment and recovery service work flows. As a result, when using the left navigation, you will immediately note that most of the modules and screens have been logically organized in a manner which makes sense to clinical staff, case managers and administrators.

5. **Navigating:** Users can easily select where they want to start working by clicking into any of the key modules and screens for instant access. Selections on the Left Navigation will have the font change from white to black.

6. **Main Content/Results Area:** The main area of the screen will constantly change as you progress through your workflow. It is also the area which will display system and client information, as well as allow you to enter data.

7. **Section Headers:** WITS often contains screens which are comprised of several sections. Therefore, to make it easy to navigate the page, section headers have been provided for clear identification.

8. **Function Links:** If the screen you are in allows you to perform certain functions, such as adding a client, reviewing data, exporting data etc., the functions will usually appear in the section headers as white underlined links.

9. **Action Buttons:** As you enter data and navigate between screens, you will be given various options such as Save, Clear, Cancel, Go, and Finish, all indicated by easy to view buttons.

10. **Input Fields/Selection Boxes:** The main content area is the location where the user will enter data into fields, selection boxes, drop-down lists etc. Keep in mind that some fields may be required by your WITS application and will be indicated as such by a Dark Yellow color.

11. **Lists:** When arriving at a screen, users will most likely first see data and information presented as lists. These lists will display available information in columns of different data types which will correspond to the Client, Agency, Facility, Staff, etc., currently selected. In addition, some lists may have an "Action" column offering functions which can be applied to a selection from the list.

Data Field Conventions:

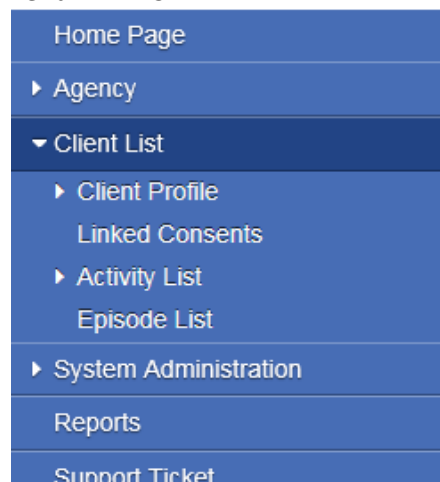|	
	Mandatory field, MUST have data in order to save record
	Read Only, system generated field, for display only & cannot be edited
	Discretionary field, will not affect completion or saving of record
	Required missing field, enter data before trying to Save or Finish
	Required for State Reporting; record may be saved but will not be complete if these are empty

System Icons:

	Required fields are missing data, the record cannot be updated until data is entered.
	Warning, data has been entered which falls outside of a certain parameter. The record can be updated but you have been warned.
	This application is designed for Microsoft Internet Explorer version 10.0 or higher. Make sure all Windows patches and updates are applied.
	System generated Informational messages usually informing you of a pending task or event needing attention.

Site Navigation:

Client List> Client Profile

The above convention is used throughout this document to show the Navigation path needed to access the module.   Each > indicates a level down from the previous in the left Navigation menu. Below is a screen shot of the left Navigation menu in WITS.

Actions:

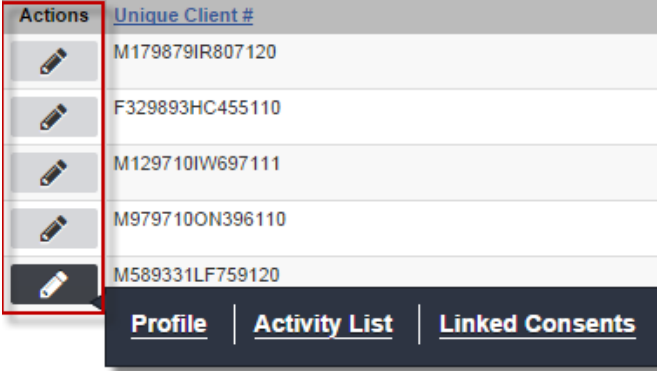|	
Cancel	Cancels the current action and returns you to the previous page.
Save	Saves data entered and remains on the current page.
Finish	Saves data entered and returns you to the section start page.
← →	Navigate through the pages\screens in each section.
Clear	Clears all criteria from the search tools when present.
Go	Run the search tool using the criteria entered.
Frequency Date — Administrative Actions — Associated Plans Contracted Facilities	A blue line under a field means you can do something with that field. • Column headings – can click the column heading to sort the table alphanumerically from 1-Z and then Z-1. • Administrative actions – can click on the administrative action to initiate that page \ screen.
> <	Move data from one choice box to another.
Client List (Export) Actions Unique Client # 🖉 M179879IR807120 🖉 F329893HC455110 🖉 M129710IW697111 🖉 M979710ON396110 🖉 M589331LF759120 Profile │ Activity List │ Linked Consents	On list screens, can hover over an Actions pencil icon that will allow you to navigate quickly to screens associated to items in that list.